Fall BEDS Staff Collection Navigation Guide

Navigation Instructions

Overview

The purpose of this reference guide is to demonstrate the basic navigation of the Fall BEDS Staff Application.

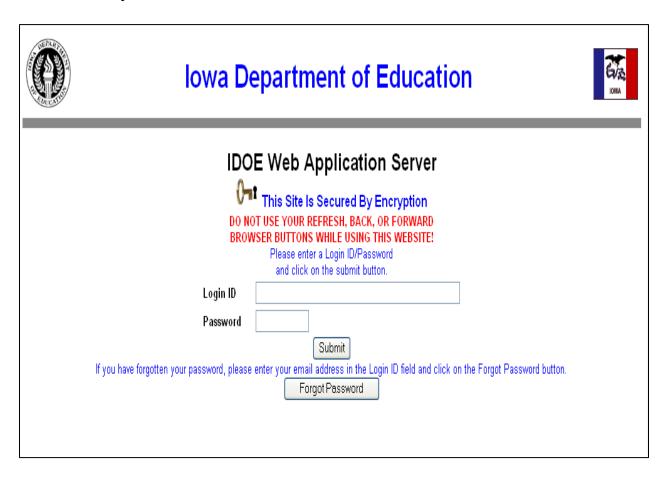
Objectives

The following objectives apply to this training.

		Page
1.	Access the portal	3
2.	Enter the application	4
3.	Keys to navigating the application	6
4.	Application features	8
	4.1. Import/Export	8
	4.2. District/Staff	14
	4.2.1. Add Staff	15
	4.2.2. Action Buttons	19
	4.2.3. Other Features	20
	4.2.4. Modes	22
	4.3. Errors/Omissions	24
	4.4. Mentoring	28
	4.5. District Contact	29
	4.6. Certification Page	30
5.	Licensure	33

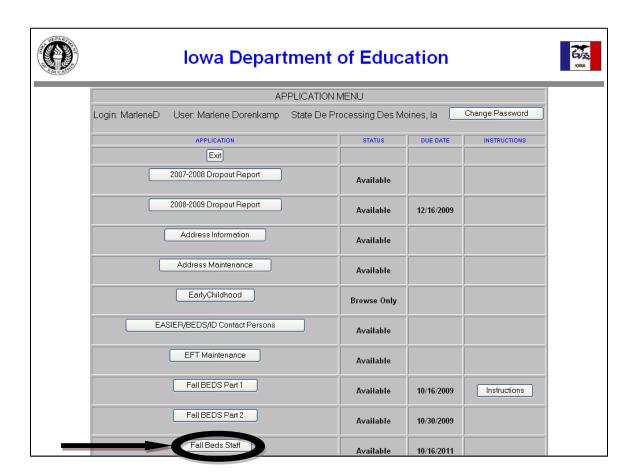
Accessing the Portal

- 1. Before you begin
 - 1.1. You need a User ID and Password
 - 1.2. You need to use either Internet Explorer or Firefox if you are using a MAC.
 - 1.2.1. There are technical issues if using Safari
 - 1.3. You need either building or district level update rights
 - 1.3.1. This can be obtained from the district person in charge of the security application on EDINFO.
 - 1.4. Access the Department's secure website
 - 1.5. Open your web browser (Internet Explorer or Firefox)
 - 1.6. The URL is https://www.edinfo.state.ia.us
 - 1.7. Enter your **User ID** and **Password** and then click the **Submit** button.

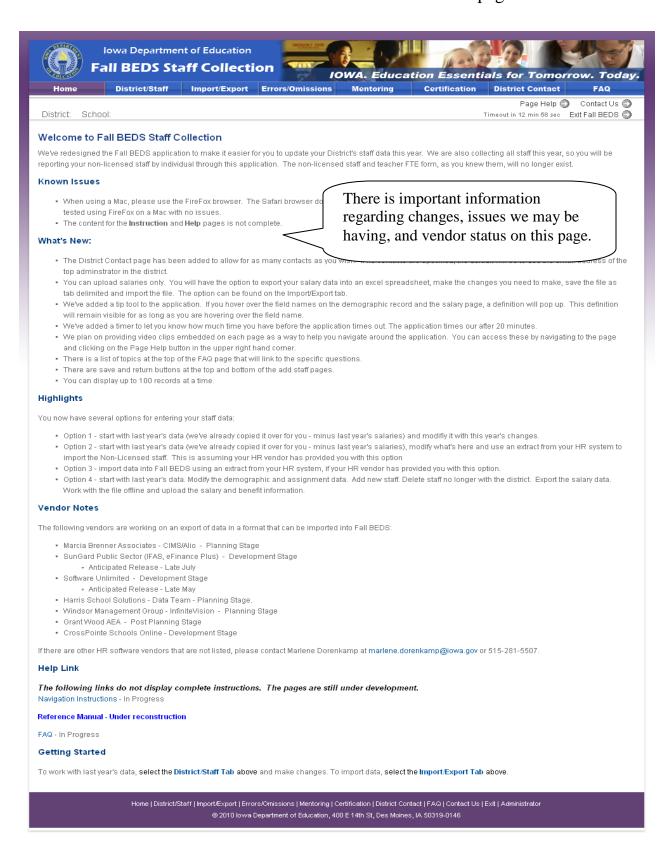


Enter the Application

- 2. The Application Menu will appear.
 - 2.1. Select Fall BEDS Staff from the list of available applications from the Application Menu.

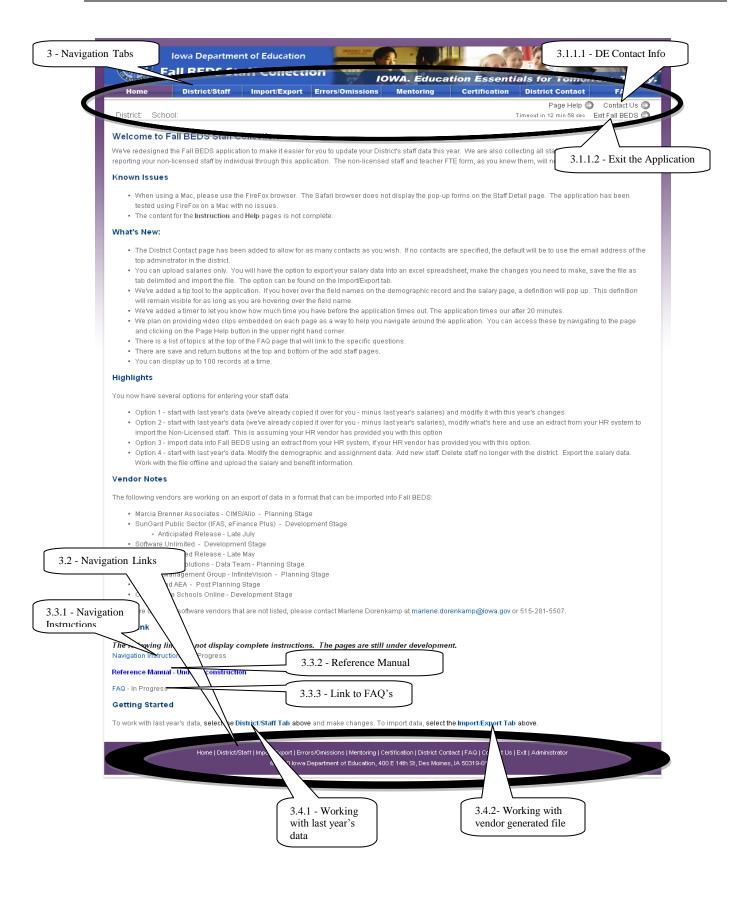


2.2. You will be on the Fall BEDS Staff Collection Home page.



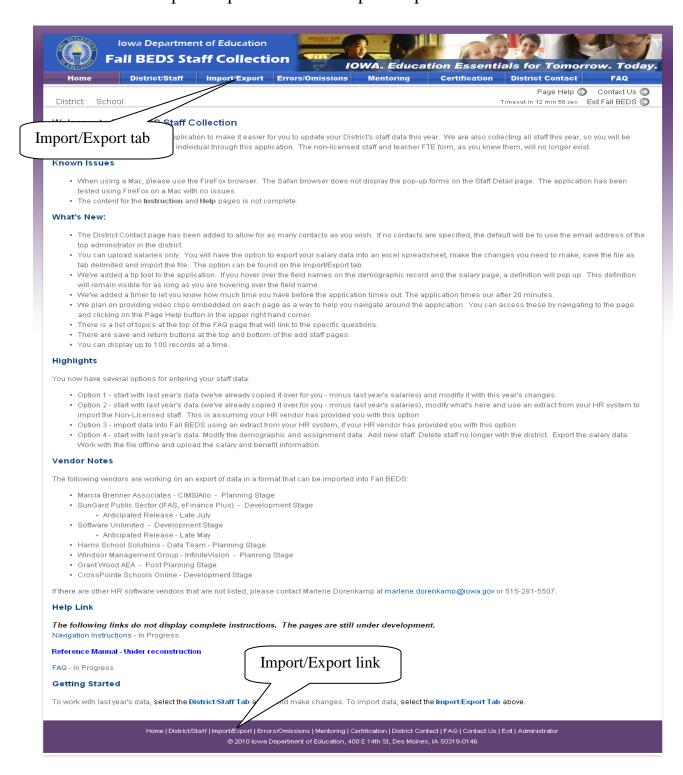
Keys to Navigating the Application Common navigation for all pages

- 3. Top of each page has navigation tabs
 - 3.1.1. Links
 - 3.1.1.1. If you need to contact one of us, click on the Contact Us link
 - 3.1.1.2. If you want to exit the application, click the Exit Fall BEDS link
 - 3.2. Bottom of each page has navigation links.
 - 3.3. Home Page specific navigation There are help links at the bottom of the content area.
 - 3.3.1. Navigation Instructions
 - 3.3.2. Link to the Reference Manual
 - 3.3.3. Link to the FAQ Page
 - 3.4. Home Page specific navigation Links to get you started
 - 3.4.1. If you are working with last year's data
 - 3.4.2. If you are working with an extract from your HR/Finance system.



Application Features Import/Export

4. Click on the Import/Export tab or the Import/Export link.



4.1. The top of the content area has important information regarding the Import/Export of data.

Import and Export Data

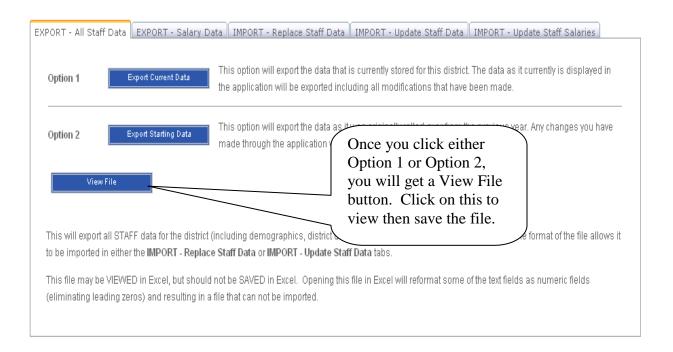
Using the Import - Replace Staff Data or the Import - Update Staff Data advances the total experience and the district experience one year. Be sure the file you upload has those years advanced, because the file overwrites any data brought forward from the prior year.

If at any time you need to start over, you can export the rolled over prior year data by clicking the Export Starting Data button

4.1.1. Just below the information section is a link to the Navigation Instructions.

Link to Nagivation Instructions click here.

- 4.1.2. There are two Export tabs and three Import tabs.
- 4.1.3. Export All Staff Data has two options
 - 4.1.3.1. Option 1 Export Current Data
 - If changes have been made the export reflects those 4.1.3.1.1.
- changes. 4.1.3.2. Option 2 - Export Starting Data 4.1.3.2.1. If something should happen and you have to start over, 4.1.3 - Export - All Staff this is the option you should choose. Data tab Option 1 - Export EXPORT - All Staff Data | EXPORT - Salary D. IPORT - Update Staff Data | IMPORT - Update Staff Salaries Current Data rus option will export the data that is currently stored for this district. The data as it currently is displayed in Export Current Data Option 1 the application will be exported including all modifications that have been made. This option will export the data as it was originally rolled-over from the previous year. Any changes you have Export Starting Data Option 2 made through the application will not be reflected. All salaries will be set to zero. Option 2 - Export Starting Data This will export all STAFF data for the district (including demographics, district data, salary data, positions, and assignments). The format of the file allows it to be imported in either the IMPORT - Replace Staff Data or IMPORT - Update Staff Data tabs. This file may be VIEWED in Excel, but should not be SAVED in Excel. Opening this file in Excel will reformat some of the text fields as numeric fields (eliminating leading zeros) and resulting in a file that can not be imported.

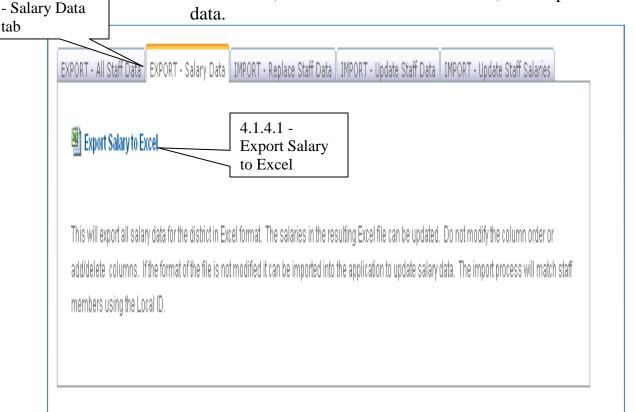


4.1.4. Export – Salary Data tab

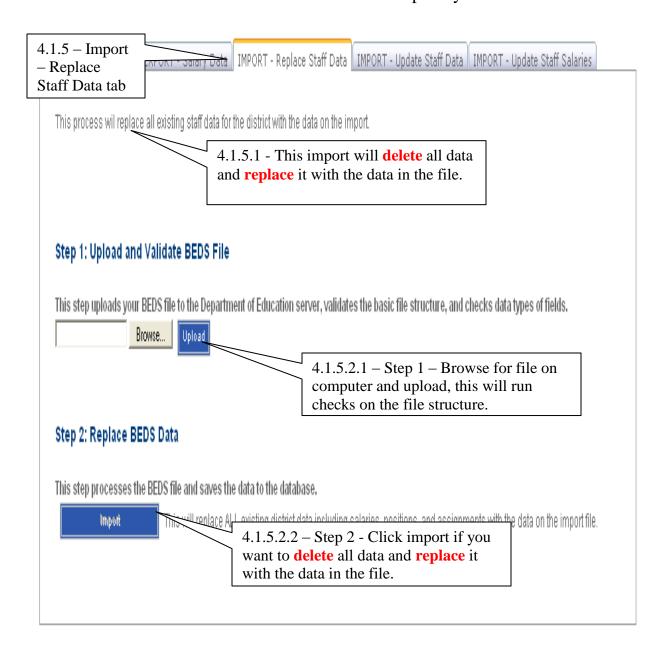
4.1.4 – Export

tab

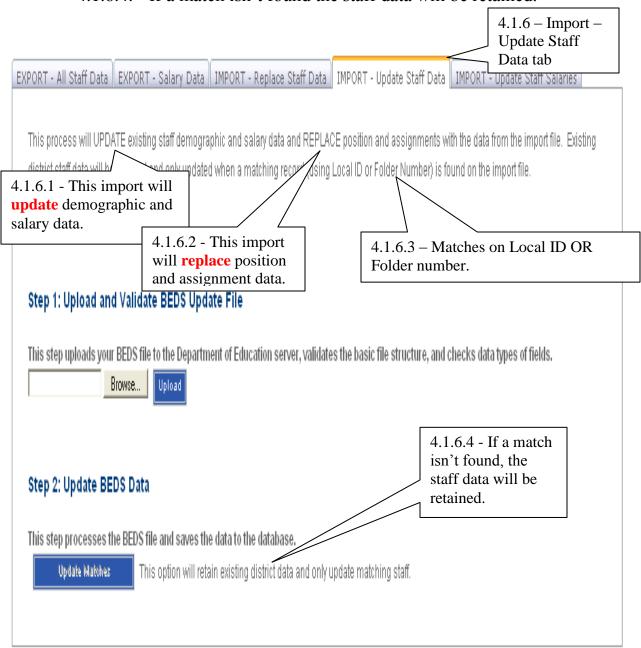
Allows you to export the salary data in Excel format, modify 4.1.4.1 the salaries, save the file as tab delimited, and import the new data.



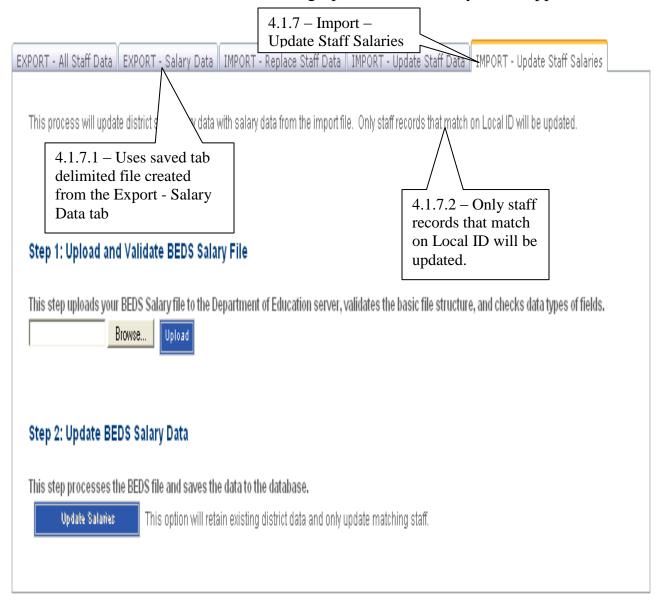
- 4.1.5. Import Replace Staff Data
 - 4.1.5.1. Use this tab if you want to import all staff data at the same time.
 - 4.1.5.2. This is a 2 step process that will run validation checks.
 - 4.1.5.2.1. Step 1- Browse for file on computer, click upload, this step will validate the file structure.
 - 4.1.5.2.2. Step 2 checks for format errors, then will replace the data rolled over from the prior year.



- 4.1.6. Import Update Staff Data
 - 4.1.6.1. Updates demographic and salary data.
 - 4.1.6.2. Replaces position and assignment data.
 - 4.1.6.3. Matches on Local ID **or** Folder number.
 - 4.1.6.4. If a match isn't found the staff data will be retained.

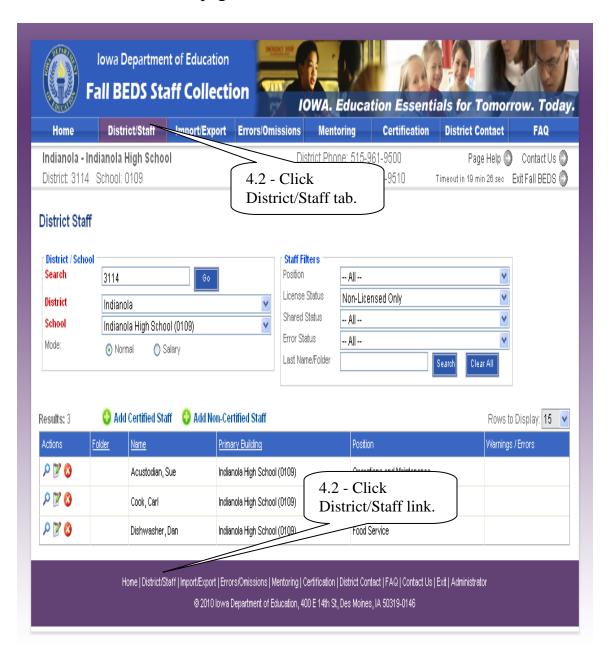


- 4.1.7. Import Update Staff Salaries
 - 4.1.7.1. Uses the saved tab delimited file created from the Export Salary Data tab.
 - 4.1.7.2. Only staff records that match on Local ID will be updated, so there must be a demographic record already in the application.



Application Features District/Staff

4.2. Click on District/Staff tab at the top of the page or the District/Staff link at the bottom of the page.



4.2.1. Add Staff

4.2.1.1. Certified

4.2.1.1.1. Folder Number lookup

4.2.1.1.2. Required fields

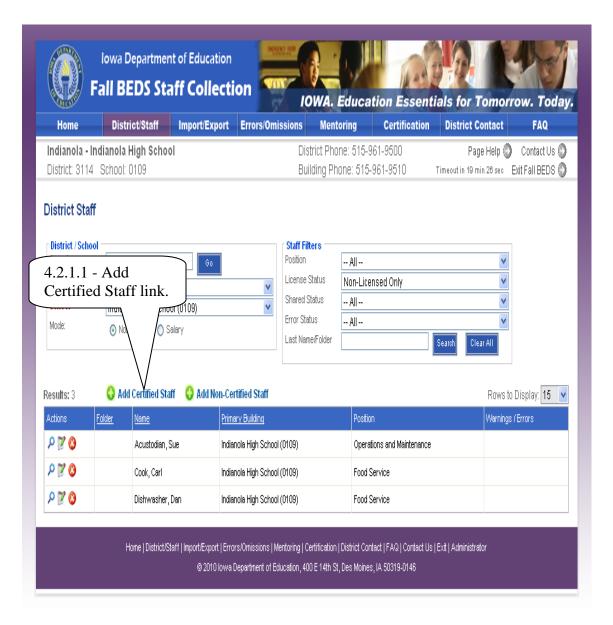
4.2.1.1.3. Save options

4.2.1.1.3.1. Save and Return

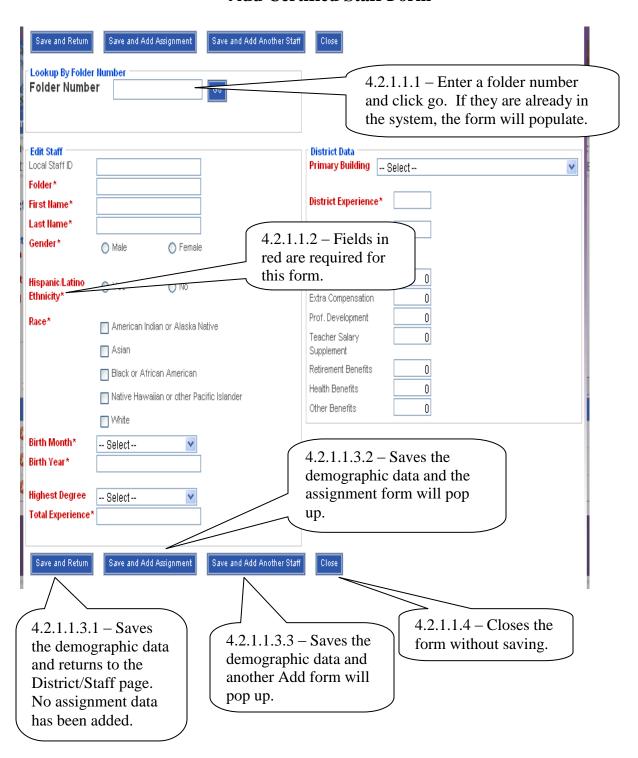
4.2.1.1.3.2. Save and Add Assignment

4.2.1.1.3.3. Save and Add Another Staff

4.2.1.1.4. Close



Add Certified Staff Form



4.2.1.2. Non-Certified

4.2.1.2.1. Required fields

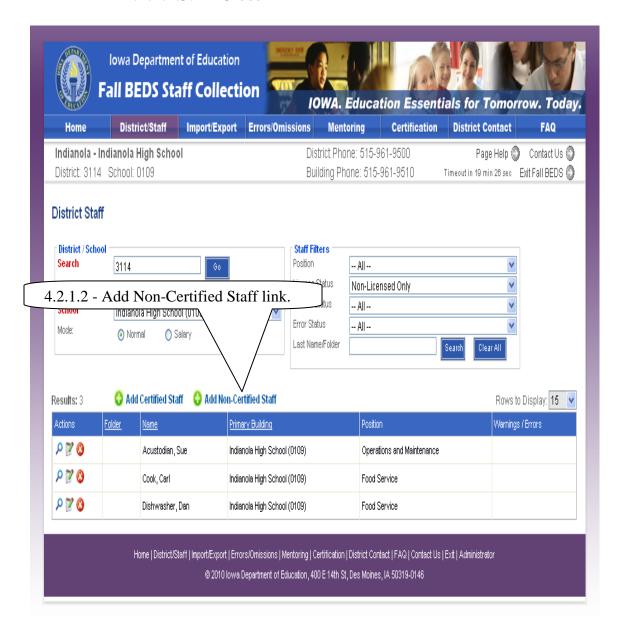
4.2.1.2.2. Save Options

4.2.1.2.2.1. Save and Return

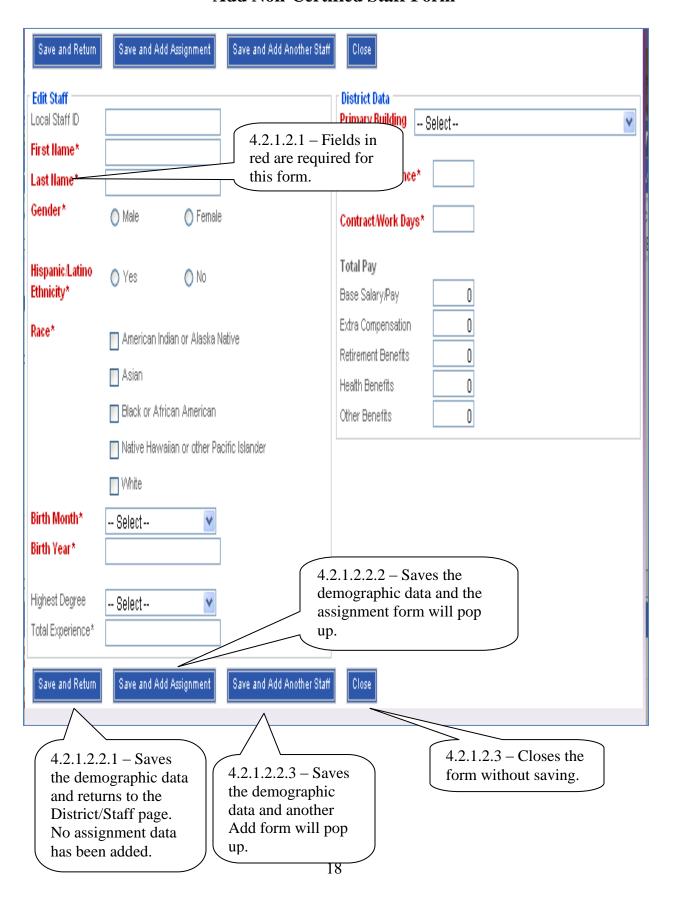
4.2.1.2.2.2. Save and Add Assignment

4.2.1.2.2.3. Save and Add Another Staff

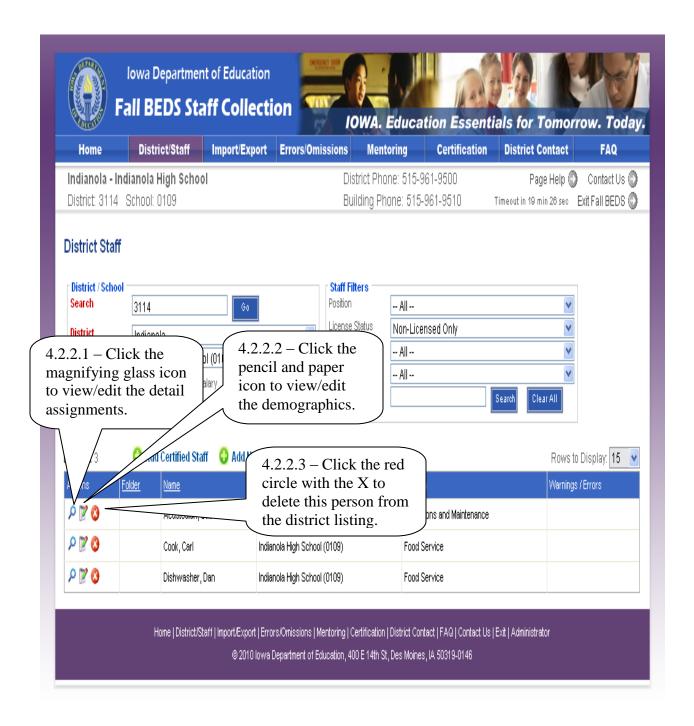
4.2.1.2.3. Close



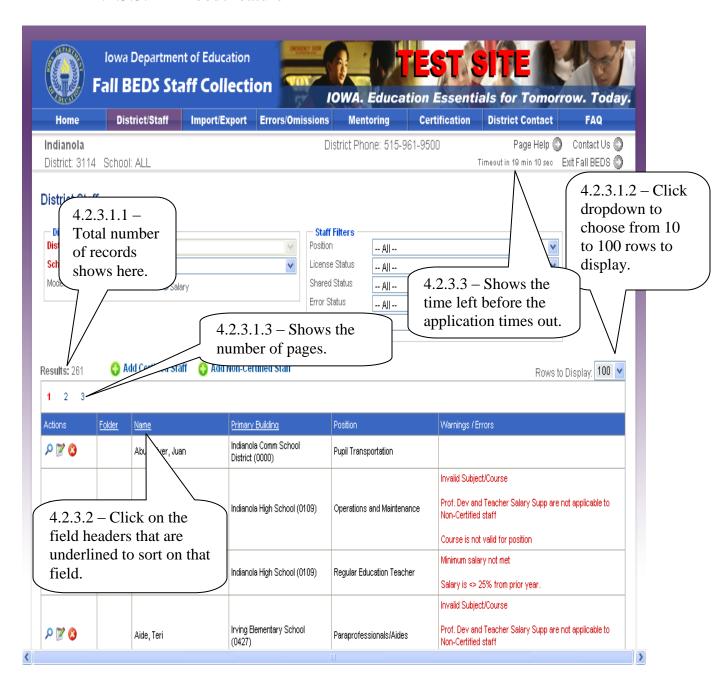
Add Non-Certified Staff Form



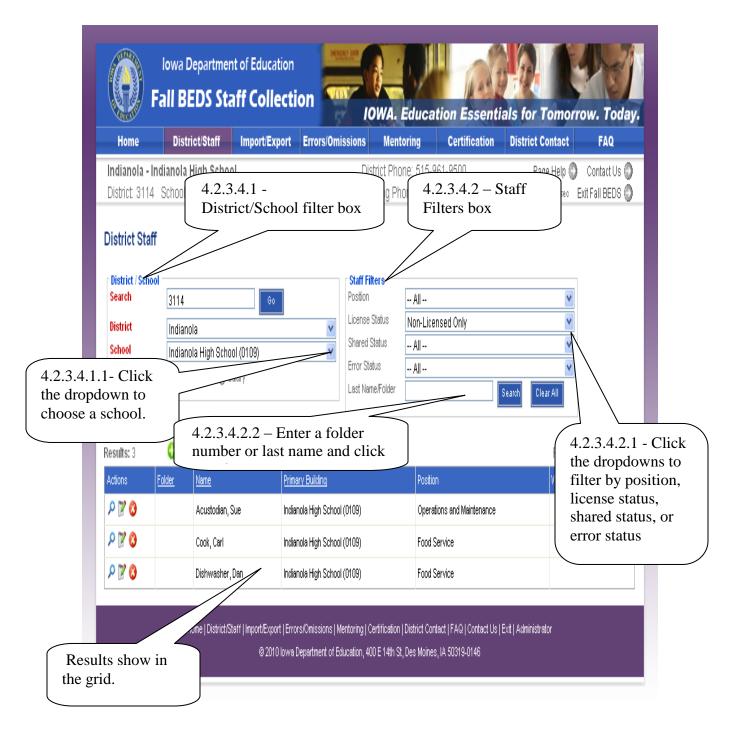
- 4.2.2. Action buttons
 - 4.2.2.1. View/Edit Detail Assignments
 - 4.2.2.2. View/Edit Demographics
 - 4.2.2.3. Delete Staff



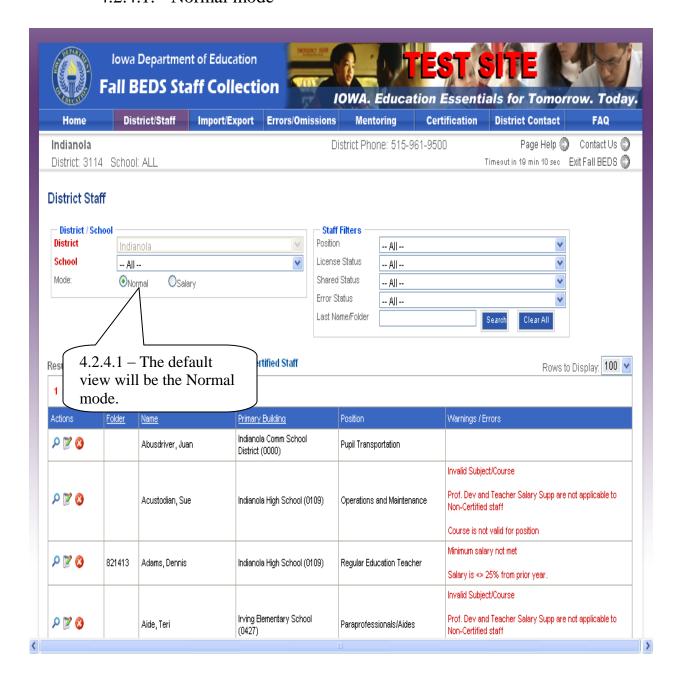
- 4.2.3. Other features
 - 4.2.3.1. Display features
 - 4.2.3.1.1. Results
 - 4.2.3.1.2. Rows to Display
 - 4.2.3.1.3. Number of Pages
 - 4.2.3.2. Sort features
 - 4.2.3.3. Timeout feature



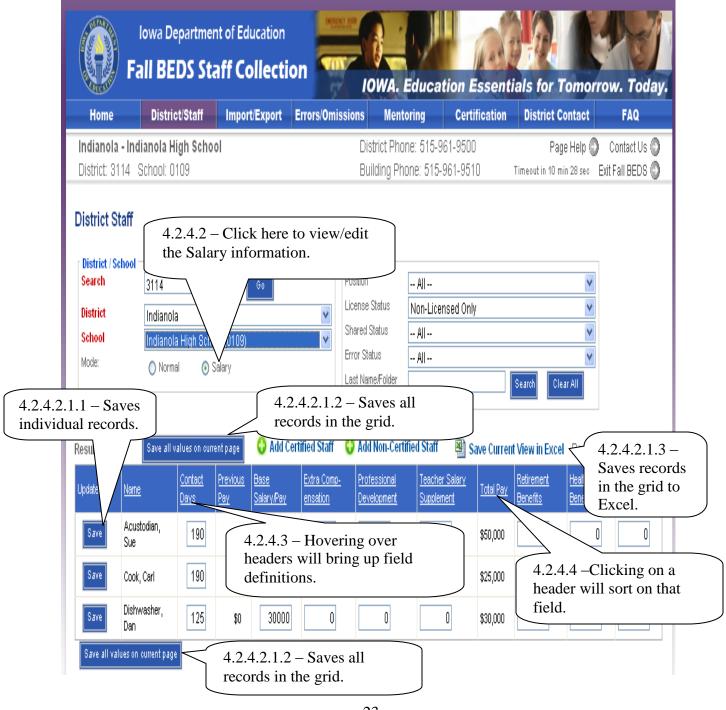
- 4.2.3.4. Filters
 - 4.2.3.4.1. District/School filter
 - 4.2.3.4.1.1. Choose a building or select All to see all buildings
 - 4.2.3.4.2. Staff filters
 - 4.2.3.4.2.1. Filter using dropdown menus
 - 4.2.3.4.2.2. Filter on folder number or last name



4.2.4. Modes 4.2.4.1. Normal mode

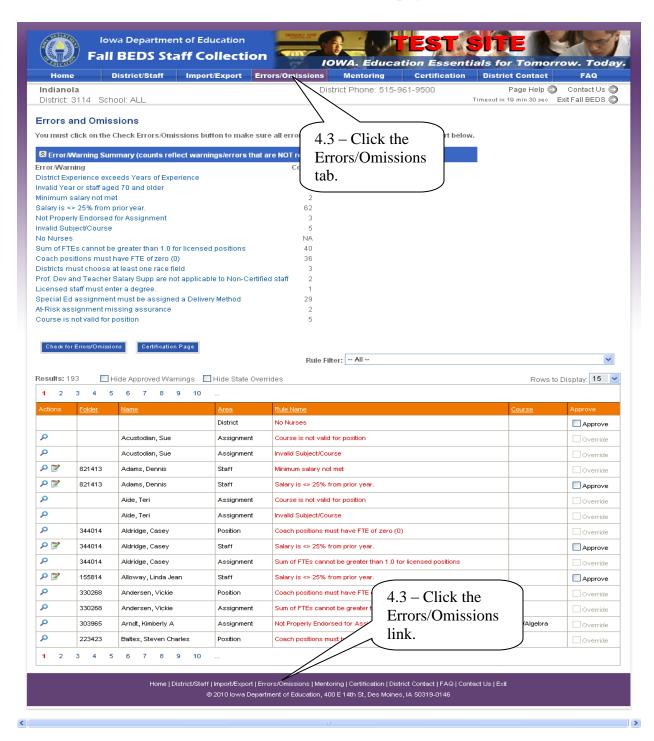


- 4.2.4.2. Salary mode
 - 4.2.4.2.1. Save features
 - 4.2.4.2.1.1. Current record
 - 4.2.4.2.1.2. Current page
 - 4.2.4.2.1.3. Save current view to Excel
- 4.2.4.3. Definitions
- 4.2.4.4. Sort options

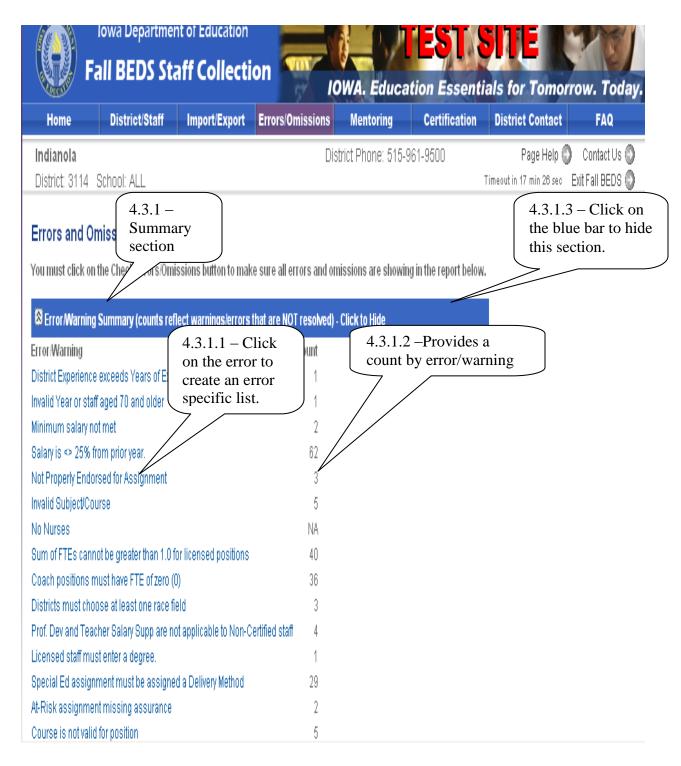


Application Features Errors and Omissions

4.3. Click the Errors/Omissions tab at the top of the page or Click the Errors/Omissions link at the bottom of the page.

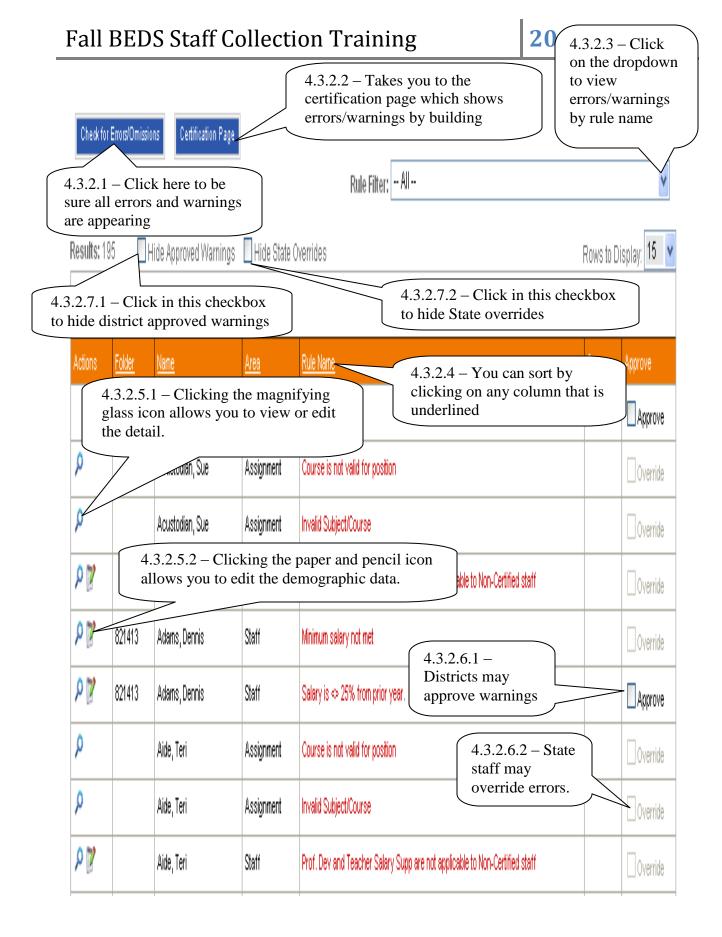


- 4.3.1. Top shows summary information
 - 4.3.1.1. Links to specific errors/warnings
 - 4.3.1.2. Gives a count of the errors
 - 4.3.1.3. Click the blue bar to hide this section



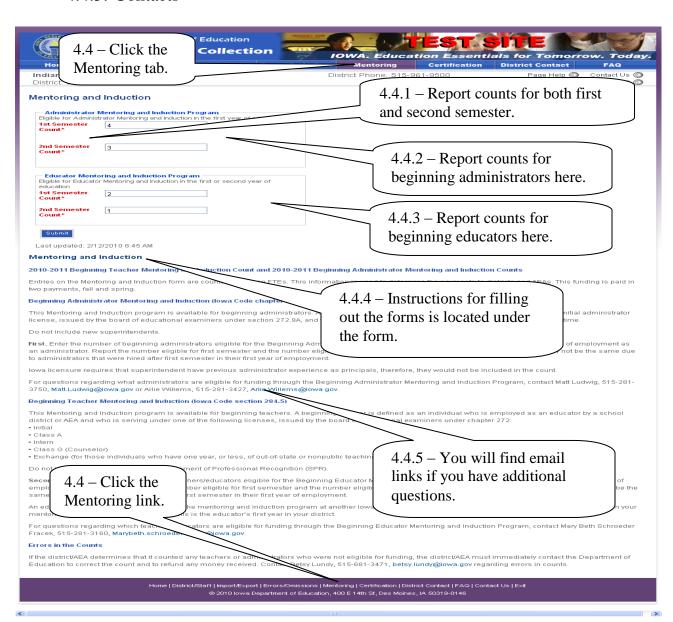
4.3.2. Bottom section shows detail

- 4.3.2.1. Check for errors/omissions button
- 4.3.2.2. Link to certification page
- 4.3.2.3. Filter on rule name
- 4.3.2.4. Sort features
- 4.3.2.5. Action icons
 - 4.3.2.5.1. View/edit detail
 - 4.3.2.5.2. Edit demographics
- 4.3.2.6. Approve column
 - 4.3.2.6.1. Approve
 - 4.3.2.6.2. Override
- 4.3.2.7. Other features
 - 4.3.2.7.1. Hide approved warnings
 - 4.3.2.7.2. Hide State overrides



Application Features Mentoring

- 4.4. Click the Mentoring tab at the top of the page or click the Mentoring link at the bottom of the page.
 - 4.4.1. Collects two semesters
 - 4.4.2. New Administrators
 - 4.4.3. New Educators
 - 4.4.4. Instructions
 - 4.4.5. Contacts



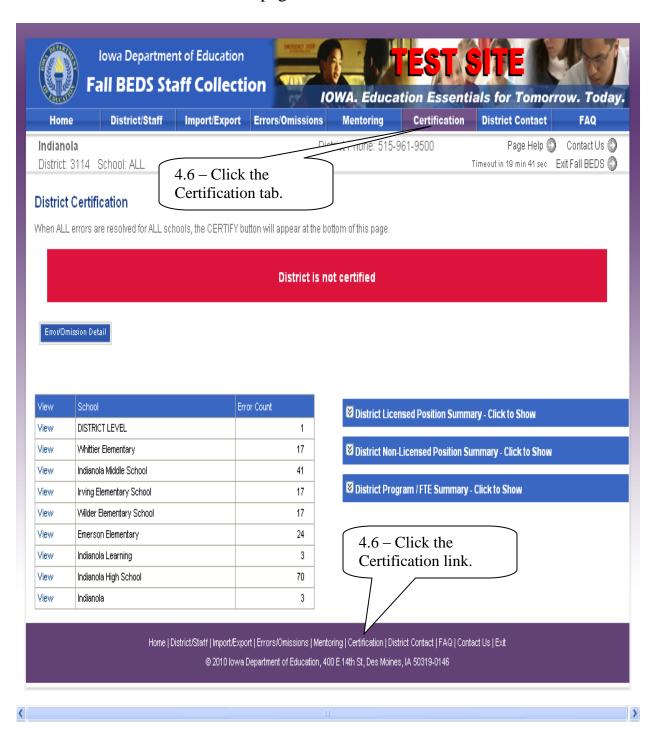
Application Features District Contact

- 4.5. Click on the District Contact tab at the top of the page or click on the District Contact link at the bottom of the page.
 - 4.5.1. District Contact Used primarily as a communication tool with BoEE regarding licensure issues.
 - 4.5.2. Default contact Superintendent
 - 4.5.3. Add additional staff

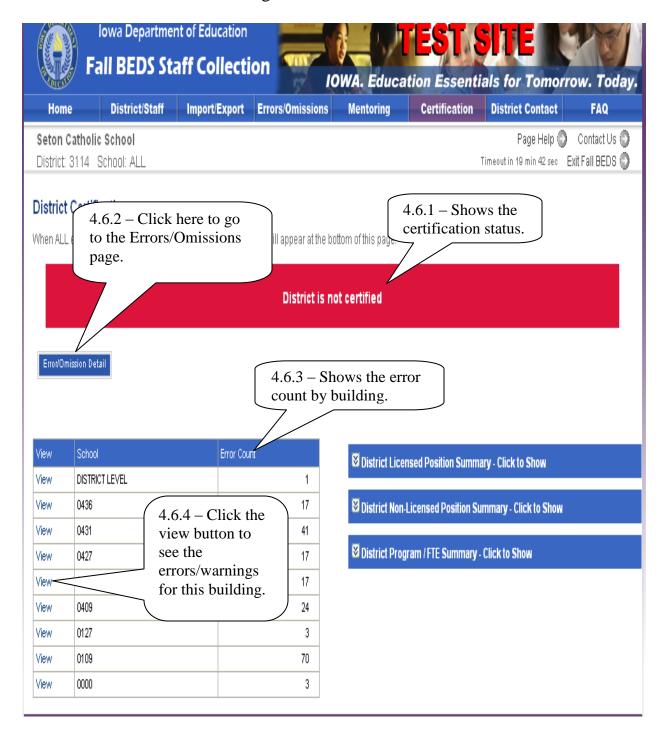


Application Features Certification Page

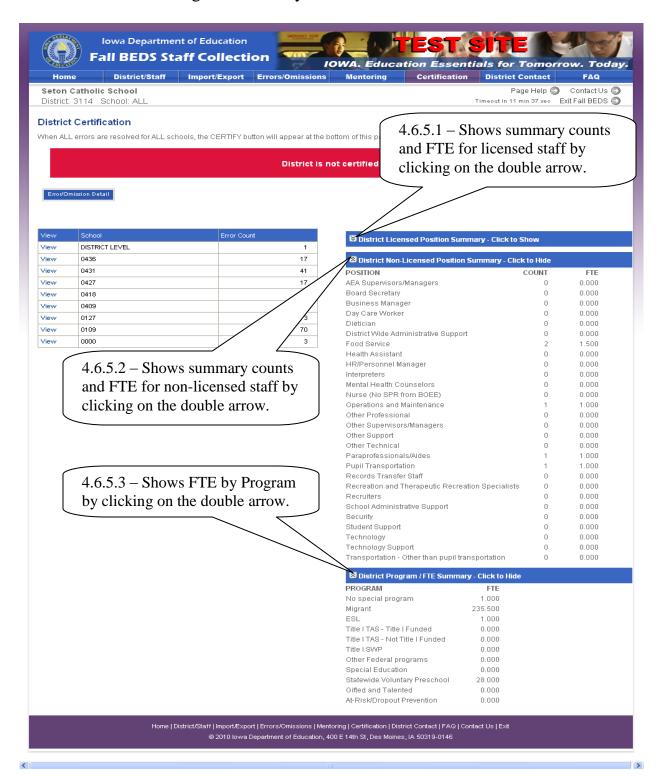
4.6. Click the Certification tab at the top of the page or click the Certification link at the bottom of the page.



- 4.6.1. Status bar
- 4.6.2. Error/Omissions Detail button
- 4.6.3. Error count by building
- 4.6.4. View errors/warnings

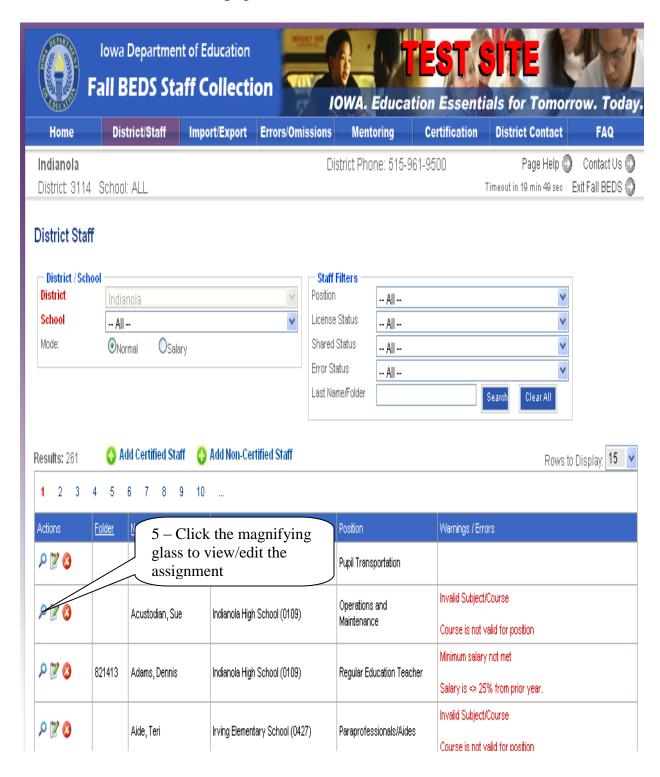


- 4.6.5. Summary counts
 - 4.6.5.1. Licensed Staff
 - 4.6.5.2. Non-Licensed Staff
 - 4.6.5.3. Program summary

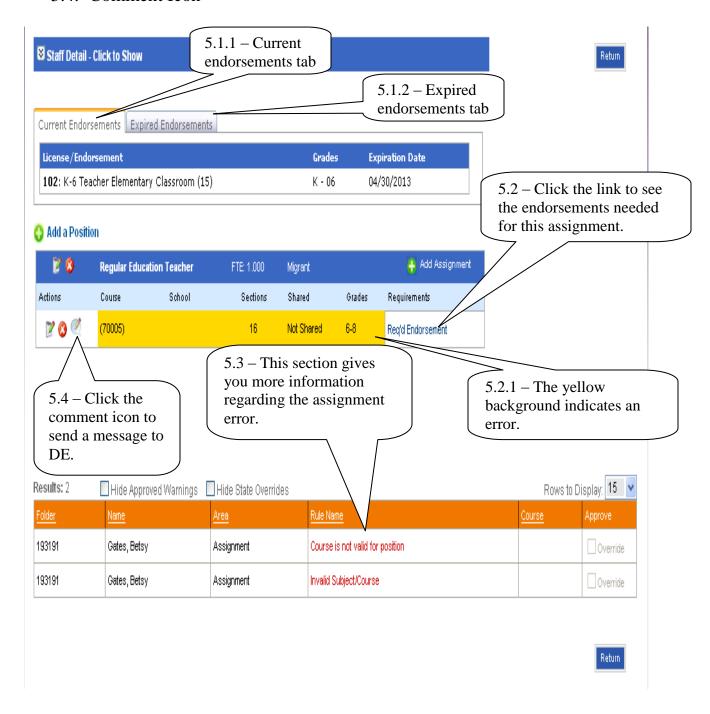


Licensure

5. Click the Magnifying glass on an individual from either the District/Staff page or the Errors/Omissions page.



- 5.1. Top portion shows endorsements
 - 5.1.1. Current
 - 5.1.2. Expired
- 5.2. Middle portion shows required endorsements.
 - 5.2.1. Yellow bar indicates an error.
- 5.3. Bottom portion shows the errors/warnings for this staff person.
- 5.4. Comment Icon



5.4.1. Comment box

5.4.1.1. If licensure replies to your comment and email will be sent to the person/persons listed on the District Contact tab.

